



# FM:Interact & SAVU Training Module



This course provides information about FM:Interact and the VCU Office of Space Management's (OSM's) Space Allocation and Validation Update (SAVU) (previously referred to as the space survey). After completing this course, VCU and VCU Health System employees will understand how FM:Interact can be used throughout the year to access university space data. Also, individuals (i.e., respondents and approvers) assigned to complete to SAVU on behalf of their department or school will understand what SAVU is, why it is important, who completes it, how to complete it and what resources are available to assist with completing it.

If you have a documented disability and require assistance to complete this learning module, please contact [learndev@vcu.edu](mailto:learndev@vcu.edu).

☰ What is FM:Interact

☰ What is SAVU

☰ Who completes the SAVU

☰ When is the SAVU conducted

☰ How to complete the SAVU

☰ How the approver reviews the SAVU

☰ Resources and contacts

# What is FM:Interact

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Office space with cubicles

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## Utilizing FM:Interact

OSM offers FM:Interact as a space data resource that can be used to determine how much space your school or department has, how it is categorized, how it is used and how much space may be needed in the future. It also provides up-to-date space data including floor plans, room numbers, departments and occupancy. The software consists of two modules: Space Management and Higher Education.

- **View floor plans any time** with the Space Management Module of FM:Interact. Log into FM:Interact ([https://vcuspace.rams.adp.vcu.edu/FMInteract\\_2018.1.24/Default.aspx](https://vcuspace.rams.adp.vcu.edu/FMInteract_2018.1.24/Default.aspx)) using your eID and password and navigate to the "Sites" menu to view floor plans for any university space sorted by campus, building and floor. The floor plans detail room data such as room numbers, space type, occupant and department. Use the "Views" and "Reports" menus to filter and download comprehensive reports such as building lists, department codes and occupancy information.

- **Complete the SAVU** using the Higher Education Module of FM:Interact. This training module will cover how to use this feature of FM:Interact to complete the SAVU.

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## What is SAVU

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Office space with cabinets, a computer, desk, table and chairs

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### SAVU

In 2021, OSM enhanced the space survey and gave it a new name: SAVU.

SAVU is the same as the space survey but allows respondents and approvers to submit updated space information the first two weeks of the months of January through September via FM:Interact, as necessary. Completing the SAVU is only necessary if space data needs to be updated.

SAVU allows OSM to gather data about physical space within VCU facilities. VCU tracks this data to:

- Inform strategic and capital planning throughout the university

- Track how much space the university has
- Find out how the space is being used
- Understand how much space is needed to schedule classes appropriately and plan for capital and real estate needs
- Inform University Budget Redesign on space use
- Serve as a metric used to determine the allocation of space costs throughout the university
- Meet annual state and federal government requirements to report space utilization

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## Who completes the SAVU

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Research laboratory with cabinets, a counter with scientific equipment and chairs

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### Pre-assigned individuals

Each VCU department and school has two types of pre-assigned individuals (or in some cases, just one type) who must report their space use data each year.

- **The respondent** completes the SAVU to document their changes to their department or school's space using FM:Interact. Departments and schools may assign multiple respondents.
- **The approver** reviews their department or school's draft SAVU in FM:Interact to ensure that the information submitted by their respondent(s) is accurate, makes any necessary changes and submits the SAVU for review by OSM. Departments and schools may only assign one approver.



Some VCU departments and schools may only have an approver who completes the SAVU and does not require someone else in their school or department to review their SAVU.

## Space Ambassadors

New in 2021, each VCU department or school has a Space Ambassador who submits space requests to OSM on behalf of their department or school, with approval from their leadership. They also ensure that OSM has an up-to-date list of their respondent(s) and/or approver. For more information, visit the [OSM website](#).

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## When is the SAVU conducted

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Reception space with a reception desk and a seating area

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### **SAVU monthly updates**

New in 2021, the annual SAVU allows respondents and approvers to update their space information during the first two weeks of the months of January through September, as necessary. Respondents and approvers will be contacted in advance of the SAVU opening.

### **Monthly updates**

Respondents and approvers can update space information during the first two weeks of the months of January through September. The SAVU only needs to be completed if space data changes when compared to the previous month.



Respondents and approvers should aim to complete each room record at least once a year to confirm that the space data has not changed.

Respondents and approvers will be able to assign principal investigators (PIs), grants, function codes and classification of instructional program (CIP) codes to spaces. This information can be reported via FM:Interact throughout the year.

Refer to the "How to complete the SAVU" section for more information.

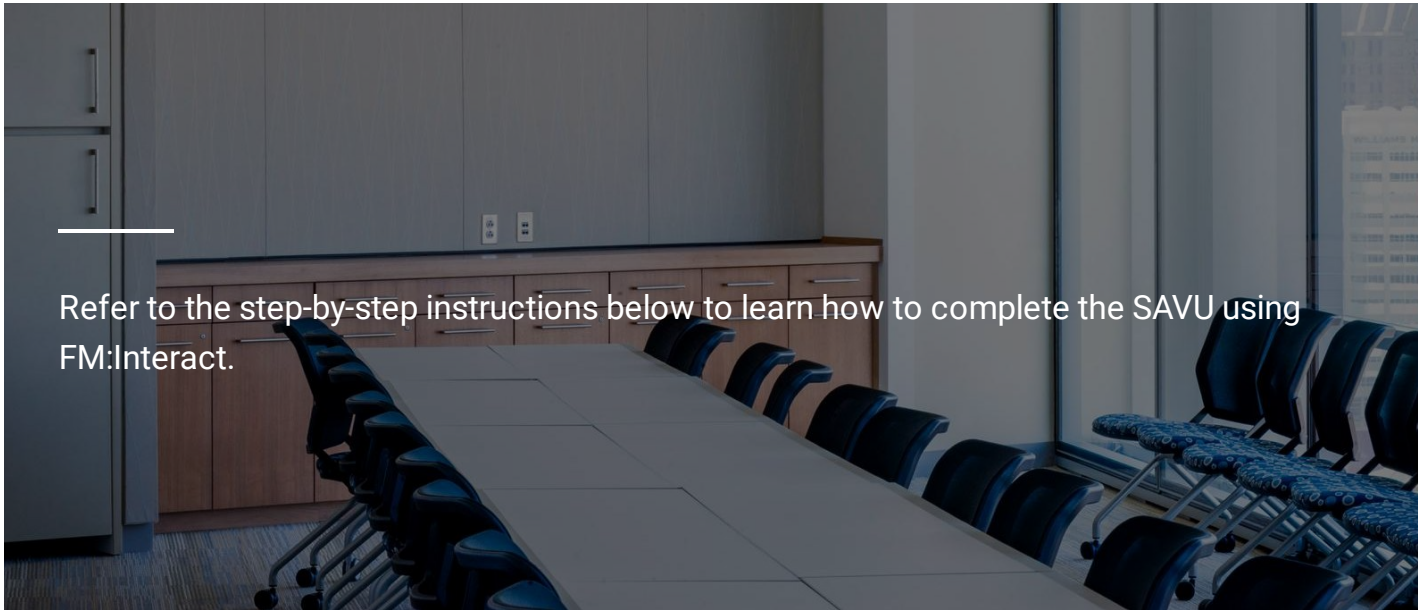
## Timeline

Visit the [OSM SAVU web page](#) for the full SAVU timeline.

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## How to complete the SAVU

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Refer to the step-by-step instructions below to learn how to complete the SAVU using FM:Interact.

## Step-by-step instructions

This section guides **respondents** on how to complete the SAVU. It can also help **approvers** understand how respondents complete the SAVU and they should update incorrect or incomplete data reported by their respondent(s).

## Step 1

### Step 1: Identify codes

Use the following documents to identify codes for each room your department or school occupies:

- [National Center for Education Statistics' \(NCES\) CIP Code Browser](#)
- [Departments Codes](#)
- [Function Codes](#)
- [Space Types](#)

## Step 2

### Step 2: Log into FM:Interact

Use your eID and password to log into FM:Interact at [https://vcuspace.rams.adp.vcu.edu/FMInteract\\_2018.1.24/Default.aspx](https://vcuspace.rams.adp.vcu.edu/FMInteract_2018.1.24/Default.aspx).

You must be logged into the VCU network on the Monroe Park Campus, or if you are on the MCV campus or off-campus, you must use VPN. Visit the [VCU Tech Services website](#) for instructions to set up VPN. For assistance with VPN, contact your Tech Services department.

Only respondents and approvers can access the SAVU. However, if someone else needs access, the school or department's Space Ambassador can request access by emailing [fmdspace@vcu.edu](mailto:fmdspace@vcu.edu).



## Step 3

### Step 3 - Open relevant floor plans

The screenshot displays the VCU Space Management software interface. On the left, a sidebar shows a tree view of sites and floors. The 'Monroe Park Campus' is selected, and the '1st Floor' is highlighted. The main area shows a detailed floor plan of the 1st floor of Williams House, with various rooms and corridors labeled with numbers and names. A red box highlights the 'Actions' dropdown menu in the top right corner of the floor plan view. Below the floor plan, there is a table with 'Area Information' and a list of rooms.

Type	Area	Group	Room Name	Capacity	Occupancy
	163.29	1341	Office	1	1
	158.35	1341	Office	1	1

Open floor plans for spaces your department or school occupies to reference while completing the SAVU.

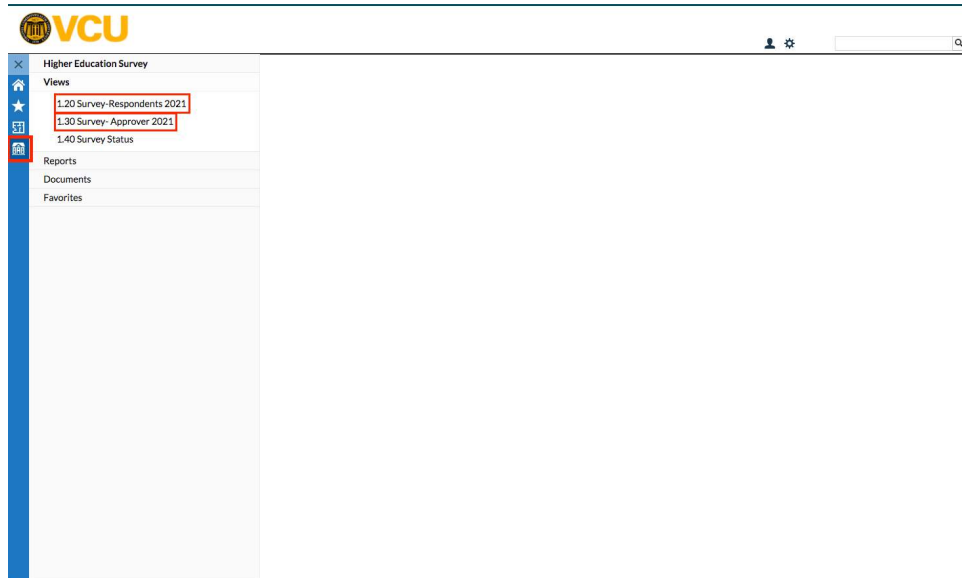
Select the "Space Management" floor plan icon (third icon in the toolbar on the left) and choose the site, building and floor. Use the "Actions" drop down in the floor plan view to print the floor plan or export it as a PDF.

Floor plans can also be accessed by clicking "1.40 Rooms" and filtering to the appropriate department or school.

*Tip: Bathrooms, hallways, stairs, elevators, mechanical rooms and housekeeping spaces are classified as "non-assignable" spaces. However, hallways inside of a private office, lab suites and private bathrooms may appear if they are not open to the public.*

## Step 4

### Step 4 - Open the SAVU view



Select the school house icon (fourth icon in the toolbar on the left) and under “Views,” click “1.20 Survey-Respondent” or “1.30 Survey-Approver,” depending on your role.

## Step 5

### Step 5 - Review the list of rooms

The screenshot displays the VCU Higher Education Survey interface. At the top, the VCU logo is visible. The main content area shows a table of rooms with columns for Building, Building Name, Room, Space Type, Room Name, Area, Department, Department Name, Complete?, and Survey Type. The first row is highlighted, and the 'Edit' button for the first room is circled in red. Below the table, there is a pagination control showing 'Items 1 to 7 of 7', 'Page: 1 of 1', and 'Page size: 100'. Below the pagination, there are three tabs: 'Room Details', 'Space Information', and 'Confirmation'. The 'Room Details' tab is active, showing fields for Building (0051), Room (1404), Department Correct? (Select One), Space Type Correct? (Select One), Has the floor plan changed? (Select One), and Employee Capacity. A 'Required Field' legend is at the bottom left, and 'Save Changes' and 'Cancel' buttons are at the bottom right.

	Building	Building Name	Room	Space Type	Room Name	Area	Department	Department Name	Complete?	Survey Type
<input checked="" type="checkbox"/>	0051	Facilities and Financial Services Building	1404	310	Office	115.46	1883	University Space Management	<input type="checkbox"/>	ANNUAL-STATI
<input type="checkbox"/>	0051	Facilities and Financial Services Building	1402	310	Office	112.48	1883	University Space Management	<input type="checkbox"/>	ANNUAL-STATI
<input type="checkbox"/>	0051	Facilities and Financial Services Building	1406	310	Office	153.69	1883	University Space Management	<input type="checkbox"/>	ANNUAL-STATI
<input type="checkbox"/>	0051	Facilities and Financial Services Building	1400	315	Office Serv.	501.70	1883	University Space Management	<input type="checkbox"/>	ANNUAL-STATI
<input type="checkbox"/>	0051	Facilities and Financial Services Building	1403A	315	Office Serv.	3.92	1883	University Space Management	<input type="checkbox"/>	ANNUAL-STATI
<input type="checkbox"/>	0051	Facilities and Financial Services Building	1407A	315	Office Serv.	19.95	1883	University Space Management	<input type="checkbox"/>	ANNUAL-STATI
<input type="checkbox"/>	0024	James W. Black Music Center	B-102D	730	Storage	961.01	1883	University Space Management	<input type="checkbox"/>	ANNUAL-STATI

Items 1 to 7 of 7 Page: 1 of 1 Go Page size: 100

Room Details | Space Information | Confirmation

Building: 0051  
Room: 1404  
\* Department Correct?: Select One  
\* Space Type Correct?: Select One  
\* Has the floor plan changed?: Select One  
Employee Capacity:   
\* Required Field  
Save Changes Cancel

A list will open with rooms currently assigned to your department or school. If rooms appear that do not belong to your department or school, email [fmdspace@vcu.edu](mailto:fmdspace@vcu.edu).

**Respondents** will enter the information requested in steps 6 through 12.

**Approvers** can review the information in steps 6 through 12 to update room information if it is incorrect.

Update incorrect details by clicking the "Edit" button.

*Tip: To display more rooms per page, use the "Page size" feature.*

## Step 6

### Step 6 - Updating room details

Items 1 to 7 of 7 Page: 1 of 1 Go Page size: 100

**Room Details** Space Information Confirmation

Building 0051

Room 1404

\* Department Correct? Select One

\* Space Type Correct? Select One

\* Has the floor plan changed? Select One

Employee Capacity

\* Required Field

Save Changes Cancel

**Respondents** must enter the information below, and **approvers** must ensure that their respondent(s) entered the correct information.

Click "Edit" and locate the box below the list of rooms with the "Room Details" tab and answer the following questions for each room.

1. "Department Correct?": Refer to the "Department" column in the list above and note whether the code is correct. Select "Yes" if your department or school occupies a room, or select "No" if your department or school no longer occupies a room. For "Proposed Department," enter the department that occupies the space or enter "XXXX-unknown" if you do not know which department occupies the space.
  - a. If you enter a proposed department and later want to change the "Department Correct" answer from "No" to "Yes," click "Clear" next to the proposed department.
  - b. *Tip: Space is assigned by department number. Reference the [Department Codes document](#) for a list of department codes.*
2. "Space Type Correct?": Refer to the rooms "Space Type" and "Room Name" in the list above and choose "Yes" or "No."
3. "Has the floor plan changed?": Indicate whether the room dimensions have changed. If the room has been renovated since the last space update, select "Yes" and provide a brief description of what has changed in the "Notes" of the "Confirmation" tab.
4. "Employee Capacity": Enter the maximum number of occupants in a room to include faculty, staff and/or student workers – students should not be counted, only student workers. Offices typically have a capacity of one; however, an office can have two

or more workstations, so the capacity should be adjusted accordingly. If the room is not used for occupancy (e.g., as storage, a conference room or a classroom), the capacity should be zero.



## Step 7

### Step 7 - Entering space information

FM:Interact

Functional Category Codes to Rooms

**Details**

\* Function Code

\* CIP Code

Research Type  ← **Research Space Only**

Lab Type

\* Room Percent

Department

\* Required Field

For each room, enter the details below in the “Space Information” tab:

1. “Functional Category Codes to Room”: Click “Add” to add up to three different functions or CIP codes (defined below) totaling 100 percent.
  - a. Function code identifies the type of activity that most often takes place in the room (e.g., education, research or student service).
  - b. CIP code classifies every academic program.
    - a. *Tip: Refer to [CIP Codes document](#) and/or the [NCES CIP Codes Browser](#) to identify CIP codes.*
- a. Answer questions in this category for each function or CIP code.
  - a. “Room Percent”: Note the percentage of time the room is used for each function or CIP code.
    - a. *For example:* If a biological science faculty member teaches 50 percent and conducts research 50 percent of the time, their room would be assigned as 50 percent instructional (function code 11) and 50 percent individual research (function code 22). The CIP code for biological science is 26.0101.
  - b. “Research Type” and “Lab Type” fields: Indicate whether a room is used as a lab for research.

Step 8

Step 8 - Adding occupants

FM:Interact

Occupants

**Details**

EmplID (Select) **Select** Clear

Room Percent

**Submit** Cancel

“Occupants”: In the “Occupants” section of the “Space Information” tab, add all room occupants. To add an occupant, click “Add” and then “Select” (search by first and/or last name or eID). VCU employees employed for at least 30 days should be in the system.

## Step 9

### Step 9 - Adding PIs to rooms (OPTIONAL; research spaces only)

FM:Interact

PIs to Rooms

**Details**

\* Employee ID (Select) **Select** Clear

Group Code (Select) **Select** Clear

Grant Award ID (Select) **Select** Clear

\* Grant Percent

\* Required Field

**Submit** Cancel

"PIs to Rooms": Click the "Add" button to assign a principal investigator(s) (PI) and a grant number(s) to each research space. Multiple entries can be added for each space, but each section must total 100 percent for the sum of all entries.

Please note that this step is optional but provides schools or departments with research spaces with the opportunity to capture grant information within FM:Interact.

For more information about research SAVU requirements, see the [Research Space Guide](#).

Step 10

Step 10 - Confirm the SAVU entry

The screenshot shows the VCU Higher Education Survey interface. At the top, there is a navigation bar with the VCU logo and a search bar. Below this is a breadcrumb trail: "Higher Education Survey > 1.20 Survey-Respondents". A "Run Checklist" button is visible. The main area contains a table with columns: Building, Building Name, Room, Space Type, Room Name, Area, Department, Department Name, Complete?, and Completed this year. The first row is highlighted in blue and has a red box around the "Complete?" and "Completed this year" columns. Below the table, there are navigation controls for items 301 to 344 of 344, with page 4 of 4 selected. A "Room Details" section is open, showing tabs for "Room Details", "Space Information", and "Confirmation". The "Confirmation" tab is active and contains a "Notes" text area, a "Complete?" checkbox, and a "Save Changes" button. A red box highlights the "Complete?" checkbox. A red asterisk indicates a required field.

Building	Building Name	Room	Space Type	Room Name	Area	Department	Department Name	Complete?	Completed this year
0051	Facilities and Financial Services Building	1402	310	Office	112.48	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
0051	Facilities and Financial Services Building	1400	315	Office Serv.	501.70	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
0051	Facilities and Financial Services Building	1407A	315	Office Serv.	19.95	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
0051	Facilities and Financial Services Building	1404	310	Office	115.46	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
0051	Facilities and Financial Services Building	1406	310	Office	153.69	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
0051	Facilities and Financial Services Building	1403A	315	Office Serv.	3.92	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
0024	James W. Black Music Center	B-102D	730	Storage	961.01	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>

Once you have entered the details for the room, navigate to the "Confirmation" tab. Explain any room changes in the "Notes" box, check the "Complete?" box and click the "Save Changes" button at the bottom of the page. Complete this step for each room.

Once the "Space Information" and "Confirmation" tabs for the room have been completed, the room in the list will turn green and the check box in the "Completed?" column will be checked (this box can only be checked in the "Confirmation" tab after clicking "Edit").

If you have completed the record previously this year, there will be a checkbox under the "completed this year" column.

Step 11

Step 11A - Run the survey checklist

The screenshot shows a web application interface for a survey. At the top, there is a breadcrumb trail: 'Higher Education Survey > 1.20 Survey-Respondents'. Below this, a blue sidebar contains several icons, with the top one labeled 'Run Checklist' highlighted by a red box. To the right of the sidebar, there is a search bar and a 'Save query' dropdown menu set to 'Show All'. The main content area is a table with the following columns: Building, Building Name, Room, Space Type, Room Name, Area, Department, Department Name, Complete?, and Completed this year. The table contains seven rows of data, each with an 'Edit' button next to the Building ID.

Building	Building Name	Room	Space Type	Room Name	Area	Department	Department Name	Complete?	Completed this year
<input type="checkbox"/> <a href="#">Edit</a> 0051	Facilities and Financial Services Building	1404	310	Office	115.46	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <a href="#">Edit</a> 0051	Facilities and Financial Services Building	1402	310	Office	112.48	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <a href="#">Edit</a> 0051	Facilities and Financial Services Building	1406	310	Office	153.69	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <a href="#">Edit</a> 0051	Facilities and Financial Services Building	1400	315	Office Serv.	501.70	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <a href="#">Edit</a> 0051	Facilities and Financial Services Building	1403A	315	Office Serv.	3.92	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <a href="#">Edit</a> 0051	Facilities and Financial Services Building	1407A	315	Office Serv.	19.95	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <a href="#">Edit</a> 0024	James W. Black Music Center	B-102D	730	Storage	961.01	1883	University Space Management	<input type="checkbox"/>	<input type="checkbox"/>

Before submitting your survey, click on the "Run Checklist" button to make sure there are not any errors in your data.



Step 12

Step 11B - Run the survey checklist

FM:Interact

Survey Type: ANNUAL-STATE Department(s): 1883 - University Space Management View Report

Problem(s): Missing or Incorrect % for Funct

1 of 1 Find | Next

**8.93 Survey Check List - User**

Department	Building & Room	Priority	Problem
1883 - University Space Management	0024 - B-102D	High	Missing or Incorrect % for Function Codes
		Medium	Record Not Complete
	0051 - 1400	Medium	Record Not Complete
	0051 - 1402	High	Missing or Incorrect % for Function Codes
		Medium	Record Not Complete
	0051 - 1403A	Medium	Record Not Complete
	0051 - 1404	Medium	Record Not Complete
	0051 - 1406	Medium	Record Not Complete
	0051 - 1407A	Medium	Record Not Complete

After clicking the "Run Checklist" button, report "8.93 Survey Checklist - User" will appear on your screen.

Step 13

Step 11C - Run the survey checklist

FM:Interact

Survey Type: ANNUAL-STATE

Problem(s): Missing or Incorrect % for Function Codes

Department(s):

- ✓ 1310 - Fine Arts
- 1883 - University Space Management
- 1912 - Recreational Sports

View Report

1 of 13 Find | Next

### 8.93 Survey Check List - User

Department	Building & Room	Priority	Problem
1310 - Fine Arts	0039 - 101	High	Missing or Incorrect % for Function Codes

At the top of the report, the "Department(s)" drop down will allow you to view the different departments you are assigned to. Click "View Report" if you need to select a different department.

## Step 14

### Step 11D - Run the survey checklist

Survey Type: ANNUAL-STATE Department(s): 1310 - Fine Arts View Report

Problem(s): Missing or incorrect % for Functi

- (Select All)
- Missing or Incorrect % for Function Codes
- Incorrect % for Principal Investigators
- Record Not Complete
- No Space Type Code
- No Department Code
- More Than 4 Function Codes Assigned to Room
- Duplicate Function Codes
- Missing Lab Type

Priority	Problem
High	Missing or Incorrect % for Function Codes
Medium	Record Not Complete

The "Problem(s)" drop down allows you to filter the problems shown on your report. Click "View Report" after making changes.

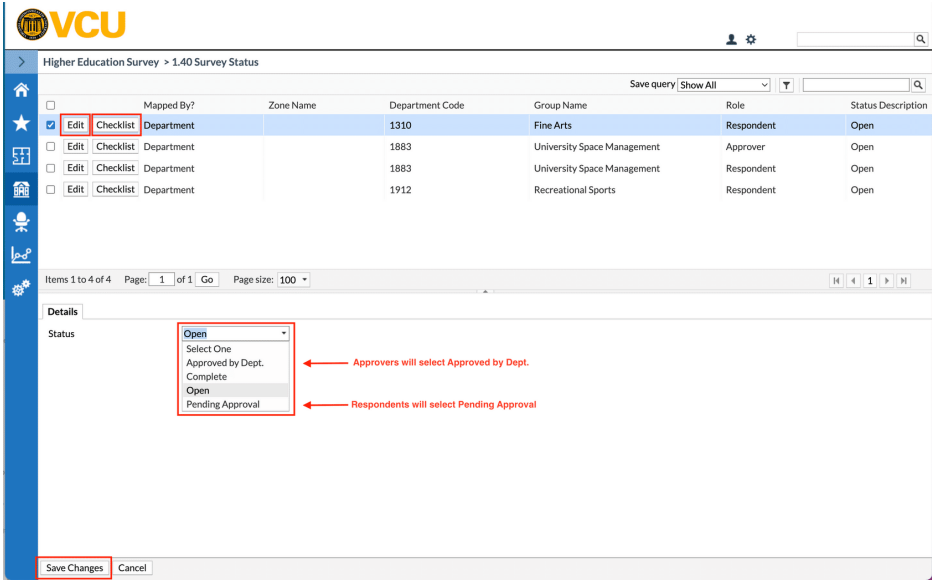
Problems can include:

- Missing function code - The room has not been assigned a function code.
- Incorrect function code % - The room percent does not equal 100%.
- Assignable space with non-assignable function code - You have used a non-assignable function code for an assignable space. If the space is a custodial, mechanical, not-usable, restroom, under renovation or circulation space, then it should not be assigned to your department. Adjust the space type and department in the "room details" tab.
- Record not complete - The record has not been completed this year.
- More than four function codes are assigned to room - Rooms are only allowed up to 4 function codes.
- Duplicate function codes - You have entered the same function code multiple times for the room.
- Missing lab type - The lab type has not been assigned as a wet, dry or other.



Step 16

Step 12 - Submitting your completed SAVU



Once you complete step 10, click the school house icon (the fourth bottom icon in the toolbar on the left) and select "1.40 Survey Status."

A window will open displaying details for your department or school. The "Checklist" button next to each assigned department will open "report 8.93 Survey Checklist - User" and allows you to check any problems before submitting.

Select "Edit" next to its name and a box will appear below the list with a tab titled "Details." Change the "Status" from "Open" to "Pending Approval" and click "Save Changes" at the bottom of the page.



### **Step 13 - Notify your approver that the SAVU is ready for review**

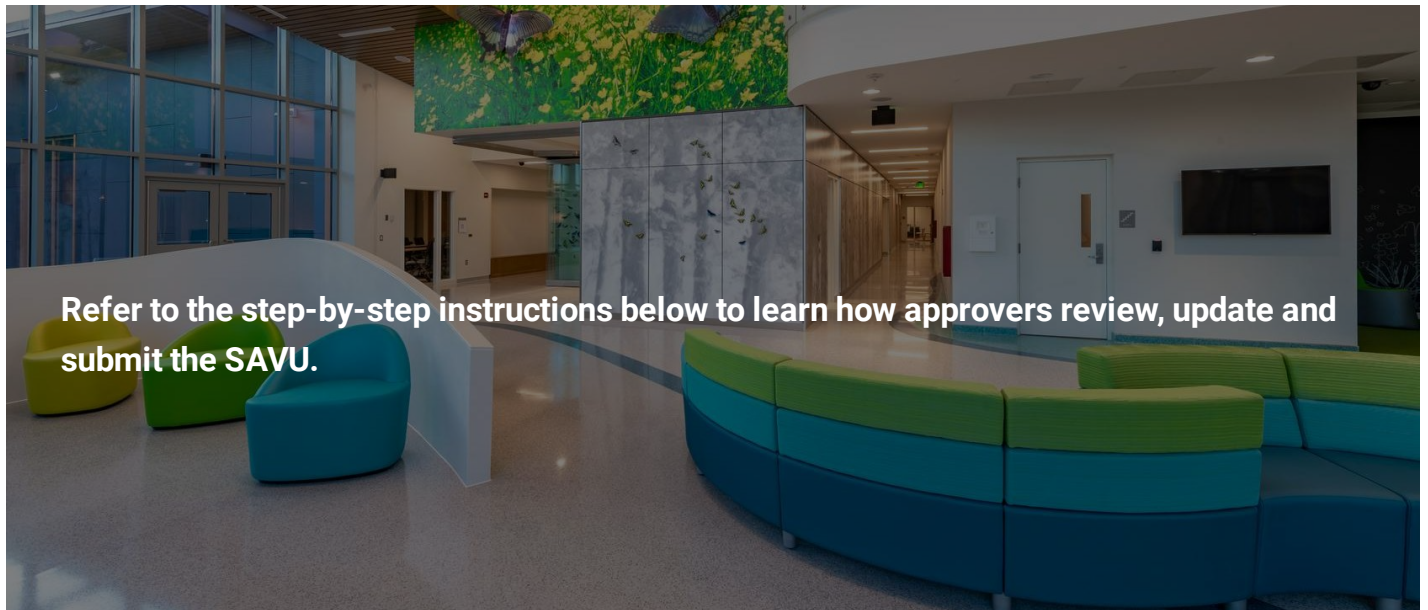
Tell your department or school's approver that the SAVU is ready for their review.

*Tip: The SAVU is not complete until the approver has reviewed the SAVU.*

## **Thank you for completing the SAVU.**

The next section will cover how to **approver** reviews the SAVU. If you are a **reviewer**, you can skip the next section and continue to the Contacts and resources section.

## How the approver reviews the SAVU



Refer to the step-by-step instructions below to learn how approvers review, update and submit the SAVU.

## **Step-by-step instructions**

**Approvers** should click through the steps for instructions on how to review the SAVU once the respondent(s) has completed the SAVU.

## Step 1

### **Step 1: Review and update reported space use data**

The department or school's respondent should notify the approver when the draft SAVU is ready for review. Approvers should refer to steps 1 through 12 of the "How to complete the SAVU" section of this training module for instructions on how to review and update any incorrect or incomplete space details.

Approvers should run the "Survey Checklist" for each assigned department to ensure that there are no outstanding issues with their report.

## Step 2

### **Step 2: Submitting the SAVU for review by OSM**

Once the SAVU has been reviewed and is ready to be submitted, the approver should click the school house icon (fourth icon in the toolbar on the left) and select "1.40 Survey Status."

A "Survey Status" window will open and display your department or school's information. Click the "Edit" button to change the status from "Pending Approval" to "Approved by Dept." and then click the "Save Changes" button at the bottom left of the page.

**Thank you for reviewing and submitting the SAVU.**

OSM will be informed that the SAVU has been completed and will follow up if necessary.



## Resources and contacts



Conference room with a table, chairs and a TV

### Resources and contacts

Continue reading for resources and contacts to use FM:Interact and complete the SAVU.

### Resources

- **SAVU training sessions** are offered prior to the start of the SAVU each year. OSM will contact the respondents and approvers with details shortly before the sessions.

- [NCES CIP Code Browser](#) to track down additional CIP codes not listed in the CIP Codes document above.
- The [Departments Codes document](#) identifies department codes.
- The [Function Codes document](#) lists function codes.
- The [Space Types document](#) identifies space codes
- The [Research Space Guide](#) includes instructions on how to complete the portion of the SAVU that applies to research entities.

## Contacts

For more information and questions about the SAVU, contact Betsy Moscoso, space data analyst, at [moscosobs@vcu.edu](mailto:moscosobs@vcu.edu).

To gain access to FM:Interact, contact OSM at [fmdspace@vcu.edu](mailto:fmdspace@vcu.edu).